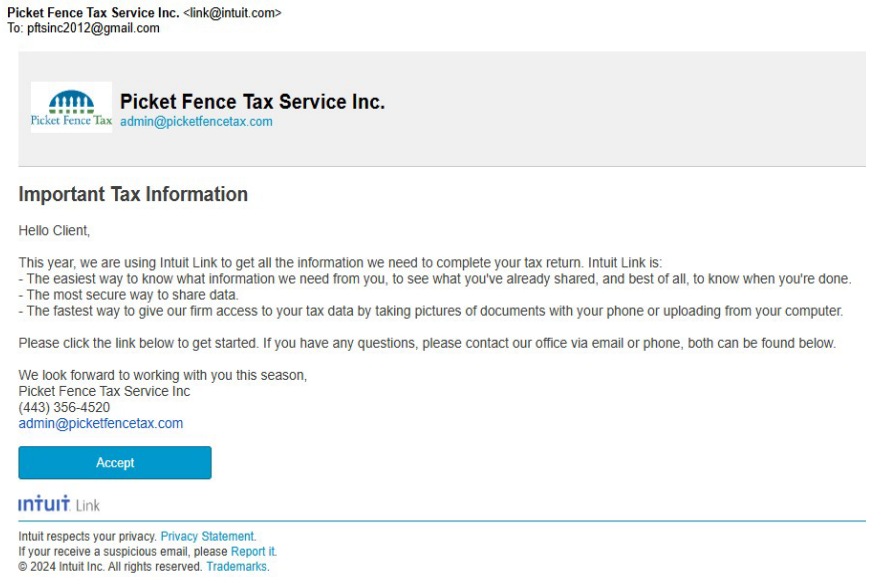
Intuit Link Instructions for Clients

Accepting an Invite/Creating an Account

- You will receive an email invite from link@intuit.com. If you have not received the invite email, please check your spam folder. If you still do not see it, please contact our office.
- Press the "Accept" button in the invitation email.



Picket Fence Tax Service Inc. <link@intuit.com>
To: pftsinc2012@gmail.com

Picket Fence Tax Service Inc.
admin@picketfencetax.com

Important Tax Information

Hello Client,

This year, we are using Intuit Link to get all the information we need to complete your tax return. Intuit Link is:
- The easiest way to know what information we need from you, to see what you've already shared, and best of all, to know when you're done.
- The most secure way to share data.
- The fastest way to give our firm access to your tax data by taking pictures of documents with your phone or uploading from your computer.

Please click the link below to get started. If you have any questions, please contact our office via email or phone, both can be found below.

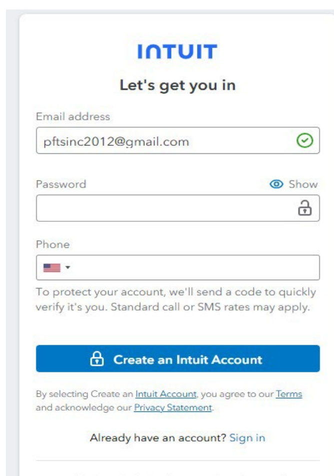
We look forward to working with you this season,
Picket Fence Tax Service Inc
(443) 356-4520
admin@picketfencetax.com

Accept

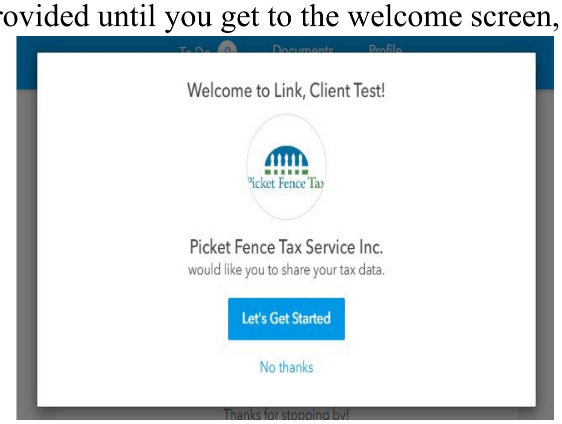
intuit Link

Intuit respects your privacy. Privacy Statement.
If your receive a suspicious email, please Report it.
© 2024 Intuit Inc. All rights reserved. Trademarks.

- Create an Intuit account by completing the requested fields **OR** if you already have an Intuit account (must be the same email address that received this invite), select the blue "Sign In" button at the bottom of the screen. *Please Note:* When creating a new account, it will require you to provide a phone number to text you a security code.



- Follow any remaining steps provided until you get to the welcome screen, then press "Let's Get Started".



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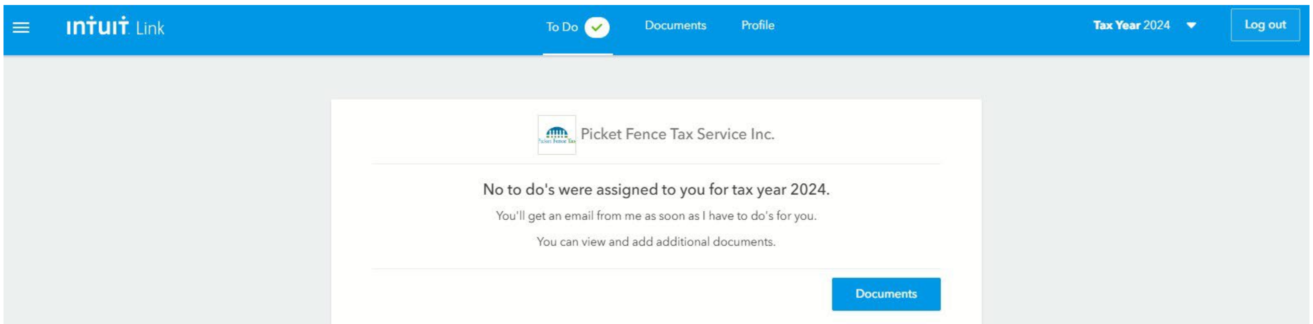
Portal Access

After accepting the initial invite, you can access the portal at any time by visiting: https://link.intuit.com/home/

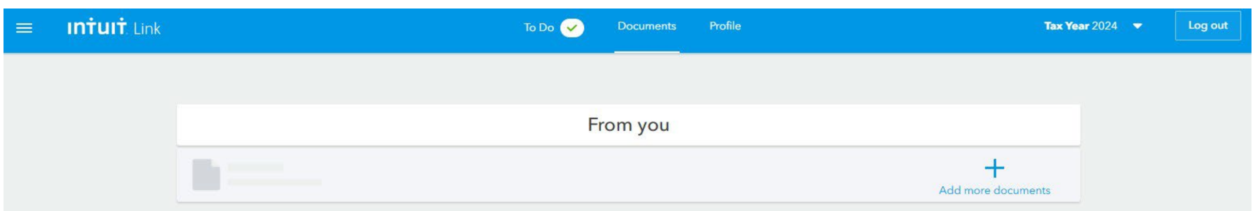
Our website also has a page with a link directly to the portal, and a copy of this instruction document to reference again in the future, if needed.

Uploading Documents

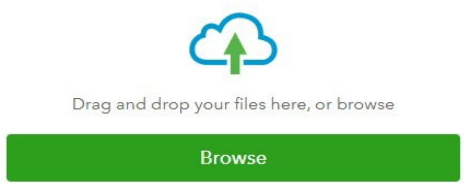
- Once logged into the portal, press the "Documents" button in the top menu.



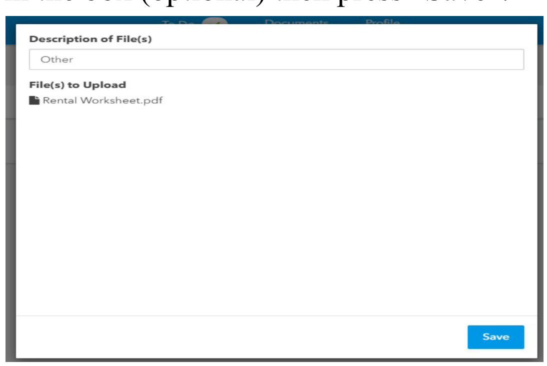
- Press the blue + button to upload tax documents. *Please upload documents in PDF format if possible!*



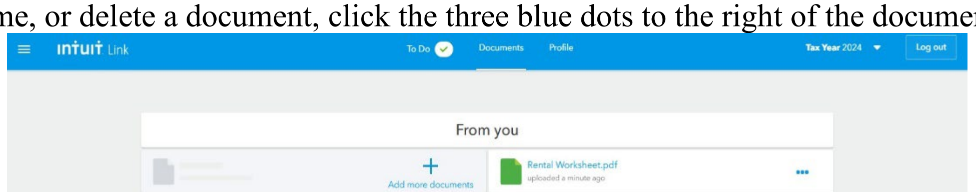
- Press the "Browse" button to find your files, select the files you want to upload, and upload.



- Add a description of the file(s) in the box (optional) then press "Save".



- Repeat this process until you have uploaded all tax documents.
- All uploaded documents will now show under the "Documents" tab.
- To open, rename, or delete a document, click the three blue dots to the right of the document name.



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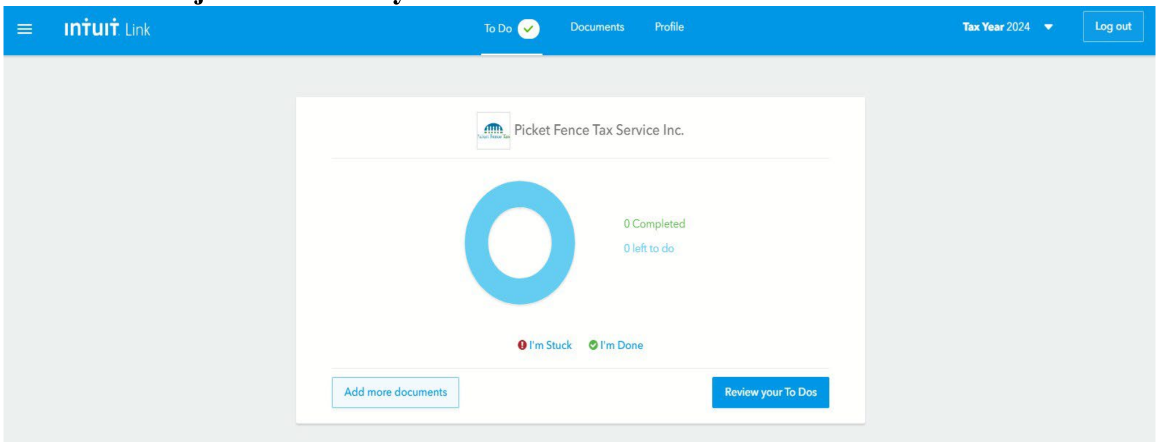
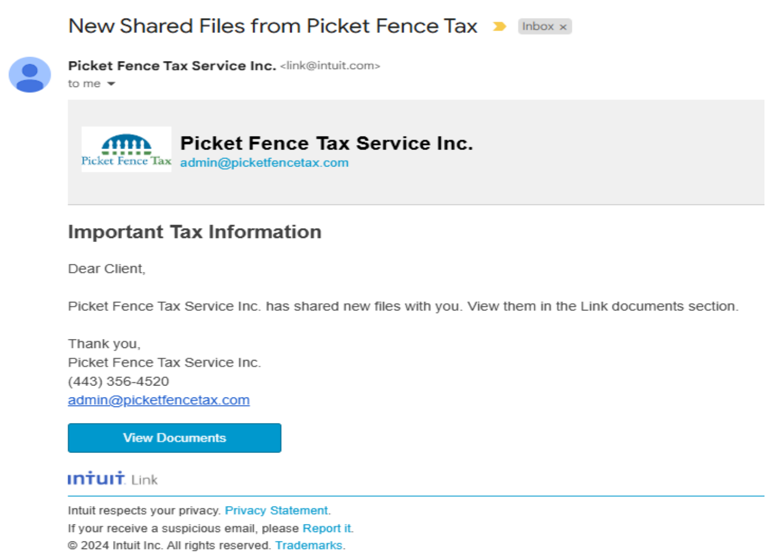
- Once you have verified all tax documents uploaded, click the “To Do” button at the top of the page.
- Then, click the “I’m Done” button, which will open an email, OR send an email to admin@picketfencetax.com to let us know you have finished uploading your documents. **Please include your name in the subject or the body of the email!**



- *Please Note:* We will NOT begin your tax return until we have received an “I’m Done” email.

Receiving/Viewing Documents from Picket

- Any time a Picket Tax staff member uploads a document to your portal, you will receive an email.
- Click the “View Documents” button in the email and log in to your Intuit account.



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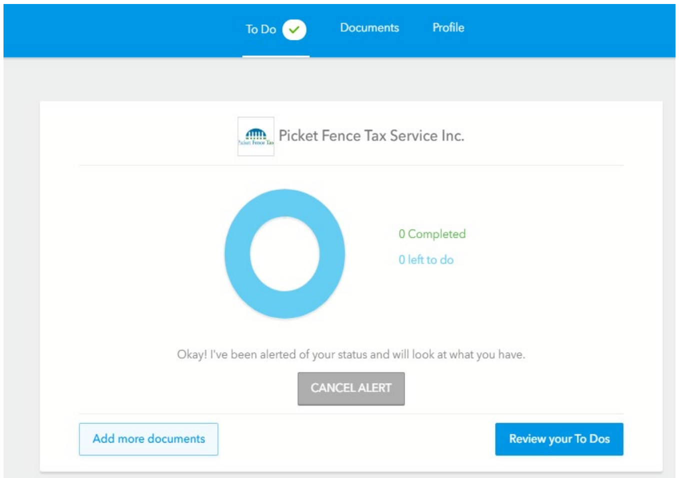
Intuit Link Instructions for Clients

- Once logged in, select the “Documents” button.



- Click the document uploaded to view it and **please SAVE/DOWNLOAD a copy to your device if it is your tax return!**